

TCM NEWS
FROM YOUR FRIENDLY
LOCAL AND SCHOOLS SERVICES UNIT
CALIFORNIA DEPARTMENT OF HEALTH SERVICES
May 2003

Hello Targeted Case Management (TCM) Coordinators and Local Governmental Agency (LGA) Staff

participating in the TCM Program! This is an **informal communication** (NOT a PPL) to remind you of important features of the TCM program and claiming system. We have listed valuable information below that will

- Help your program **receive more of the money** it is entitled to receive and
 - Help you **save time and resources** while providing TCM services.
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NAMES AND FACES

We are the Local and Schools Services Unit (LSSU). Liz Touhey is our Chief, and we are part of the Administrative Claiming Local and Schools Services Section (ACLASS) within the Medi-Cal Benefits Branch of the California Department of Health Services. Please note our contact information elsewhere in this newsletter.



LSSU staff serving the TCM program are:

- Liz Touhey, Chief,
- Carlene Hess, TCM Online Systems Specialist,
- Elizabeth Lutzenberger, TCM Program Analyst,
- David Merritt, TCM Program Analyst, and
- Laura Jones, Administrative Support

Carlene continues to develop the TCM online system and is available to help with specific technical problems that arise while processing claims online.

Elizabeth and David share duties for processing TCM invoices and cost reports and for developing the TCM program (e.g., writing Policy and Procedure Letters [PPLs], revising the TCM Provider Manual, monitoring LGA claims, responding to LGA requests, conducting site visits). Elizabeth processes claims from LGAs 01 through 30 (Alameda through Orange); David from LGAs 31 through 62 (Placer through Yuba & the Cities of Berkeley, Long Beach, and Pasadena).

Laura Jones processes all letters and other documentation and maintains our files and LGA rosters. You may see her name on emails announcing approved TCM invoices. Be sure to notify her when there are staff changes in TCM Coordinators or in who is authorized to sign TCM invoices.

THANK YOU



FOR ALL YOU DO!!!

This past cost report season challenged each LGA and State TCM staff member as we sought to approve each variation of 122 LGA cost reports. We appreciate all the assistance and cooperation we received from TCM Coordinators and LGA staff. Many difficult decisions had to be made quickly in our effort to support accountable and effective programs. LGA staff bent over backwards to provide us revision after revision when necessary. We appreciate very much the broad support and encouragement we received during this time.

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GET MORE MONEY (\$\$\$) FASTER!

We want you to receive the most federal funding to which you are entitled for having provided TCM services. Please help us help you by doing these things:

Every month, access the TCM System and review the status of all of your LGA's invoices. The Medi-Cal Eligibility Data System (MEDS) reviews all non-claimable encounters in the TCM System every night and checks for eligibility updates. When appropriate, it changes the status of encounters that were previously ineligible. Consequently, when you ask the TCM System to create a new invoice from your programs' encounters, the System might generate more invoices than you expected.

These new "extra" invoices might be sitting on the System in the "Created" status eagerly



waiting for you to discover them, print them out, and submit them for payment. To check for Created invoices, click the Invoice and Search buttons, then select the

Invoice Status code "Created" and the Fiscal Year you're interested in (be sure to check both the current and previous fiscal years). Press the Submit button and you'll have a list of any invoices that can be printed and submitted.

Every time you print out an invoice, immediately mail it (at the post office if possible). The **postmark** on the envelope containing your invoices determines whether they were received before the reimbursement deadline. Tragically, our pace of life leaves printed invoices buried beneath other important projects. We have received invoices created six months before they were mailed, and often postmarked one day too late to be approved for the maximum reimbursement. The best way to ensure you get all the money you can is to promptly get your invoices postmarked.

Save money: it's not necessary or useful to send your invoices by express mail service. Regular mail is fine. It's the **postmark that counts!** The most important way to guarantee your invoices meet their deadline is to ensure they are postmarked within six months. Once postmarked, it doesn't matter if it takes them one day or five days to get here. You can feel comfortable knowing that we will email you when your invoices arrive.

Save time and paper: send only the TCM Invoice. It's preferable to send one cover letter for an envelope of invoices; separate cover letters for each invoice are unnecessary and awkward. We don't need invoice checklists, photocopies of invoices, or photocopies of encounter lists from the TCM System. **Just the invoice and cover letter.**

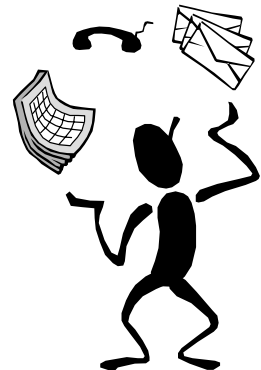
Avoid having to resubmit invoices.

- Use **blue ink** for all signatures.
- Print invoices on—and only on—your **LGA letterhead** (no CBO letterhead).
- Never use **whiteout** on an invoice.
- Use **authorized signatures only** (notify Laura Jones of any changes in who you've authorized to sign TCM Invoices).

POLICY AND PROCEDURE LETTERS

We have issued several important PPLs in the past year. They are available for review at our website, www.dhs.ca.gov/tcm. They cover the following topics:

- PPL 02-001: Significant enhancements to the online TCM System
- PPL 02-013: New requirements and standards for submitting annual TCM cost reports
- PPL 02-014: The definition of a TCM encounter for Public Guardian programs



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- PPL 02-015: Limits on claiming for TCM services provided to clients in institutions
 - PPL 02-016: The definition of a TCM encounter for Public Health, Outpatient, Linkages, Probation, and Community programs
 - PPL 03-003: Summary of Findings from DHS Site Reviews
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UPCOMING SITE REVIEWS

We are planning to conduct at least one LGA site review per quarter as part of our ongoing role as the State agency responsible for the oversight of the TCM program.

In these reviews, we hope to find that the claimed encounters are clearly supported by documentation. We recommend regularly reviewing the TCM Provider Manual's definition of encounters (Section 1), qualifications for case managers (CMs) (Section 2), and required documentation (Section 7).

FOR EXAMPLE: If the client isn't home, it's not a billable encounter. Also, to be claimable, an encounter must be documented.

THE TROUBLE WITH DUPLICATES

The TCM System reviews all encounters for duplicate entries of the Client ID, Date of Birth, and Date of Service. When duplicate information is found, you have to indicate a valid reason for the encounter. Only "Significant Additional Visit" or "Multiple Births" are valid reasons for duplicates. "Other" can be a valid reason if it is followed by a valid explanation.

There has been some confusion over **Significant Additional Visits** and valid explanations for Other. We will issue a new PPL on this subject in the near future. In brief, a significant additional visit is

- Performed by a CM.
- For a different purpose.

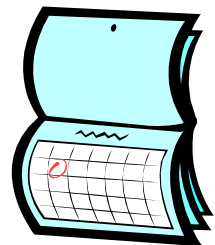
Multiple activities by one CM with one client on one visit is one encounter. Activities performed by two CMs with one client at the same time are two encounters only if the CMs had different purposes. Normally, a single CM provides a range of TCM services, not just one.

Also, if two CMs accidentally enter the same encounter into the System, inactivate the **second** entry, not the original. Several people have incorrectly used Other to explain this duplication.

Multiple Births (02) means that an encounter is claimed for a newborn using the mother's Medi-Cal ID number when another encounter is claimed for the mother and/or for a second newborn. Be sure to enter the newborn's date of birth in the box marked "Newborn DOB." The mother's date of birth goes in the box marked "Date of Birth." For the infant encounter, the infant's name must be included. Please enter it in the "Client Name" box, not in the Option Field.

TCM CALENDAR OF EVENTS

The LSSU staff is pleased to introduce a TCM Calendar of Events on our website that we hope you will find helpful. This calendar will include LGA Consortium and DHS events, trainings and due dates. We all know how difficult it can be to plan out daily tasks while keeping in mind pressing deadlines. We hope that this will be a useful tool to navigate your way to a successful outcome in TCM.



ONLINE RESOURCES

Most of your questions can be answered online. The trick is knowing where to look and how to use what you find. Feel free to contact us for help finding what you're looking for. Bookmark (or Add to Favorites) these links for easy access.

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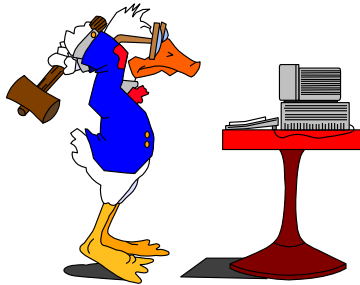
Start here. The TCM System website includes links to program information, **training**, and a login page. You can access the **Local and Schools Services Unit** website, which includes the TCM Provider Manual, by clicking on the link to "TCM Program Information." **If you or your staff are new to TCM**, be sure to review the page "How to use the TCM System" and to submit a User ID Request Form.

www.dhs.ca.gov

The main website for the California Department of Health Services includes introductions to the organization and its services.

www.medi-cal.org

Website for the Medi-Cal Policy Institute, a private organization that helps the public gain access to Medi-Cal services—very user friendly and contains good answers to frequently asked questions. The **best place to get an overview** of the Medi-Cal program.



www.leginfo.ca.gov

This website for the Office of the Legislative Counsel contains a legal library with easy access to specific codes, including the Welfare & Institutions Code.

www.calregs.com

The California Code of Regulations website includes Medi-Cal (and TCM) regulations under Title 22. The easiest way to use this website is to enter a keyword or section number into the box on the bottom left of the page and press the Search button.

HOW TO REACH US

Department of Health Services
Targeted Case Management/TCM
714 P Street, Room 1640
Sacramento, CA 95814

(The online mailing labels are also acceptable.
Above all, be sure to include our room number.)

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OUR SERVICE GOALS

We intend to:

- Deliver your TCM Invoices to DHS Accounting within five business days (except during cost report season),
- Respond to all phone calls and emails within 24 hours,
- Discuss denied encounters with you by phone and email,
- Communicate the status of your invoices by email, and
- Copy all communications with LGA staff to the LGA Coordinator by email.

Working together with you, we intend to make California's Targeted Case Management program the best it can be.